

E-Grants Security User Guide

Montana Office of Public Instruction



Montana
Office of Public Instruction
Superintendent Denise Juneau

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Introduction

The E-Grants User Logon Page gives access to E-Grants for an LEA through users entering their email address and assigned password.



Before getting started, please be sure that any Internet Explorer browsers have **Compatibility View** turned **off**, and **Pop-Up Blockers** turned **on**.

The E-Grants User Login Page displays 3 different links available to users.

Forgot Password: The Forgot Password link allows a user to request a password if they no longer can logon because of a forgotten password. When requested, the user will receive an email with a one-time password. Upon entering this password the user will be requested to change their password following these guidelines: Minimum length 6 characters, minimum 1 uppercase letters, and minimum 1 lowercase letters.

New User: The new user link allows a user to request credentials for accessing E-Grants or to establish a new Legal Entity in E-Grants. Requests for new users will first be submitted to the Authorized Representative for the district the user is requesting to be associated with. The Authorized Representative may accept or deny the user request. If accepted the request will be submitted to the OPI Security Administrator who has the final authority to grant or deny access. Requests for new vendors/organizations will be sent directly to the OPI Security Administrator for approval.

Public Access: Public access allows a user to view approved applications without entering a Username/Email and password.

Quick Tips & FAQs

➤ *I have a question about E-Grants security. Who do I contact?*

Before contacting OPI directly, please review this entire document. We have tried to list clear step-by-step instructions so that users do not need to rely on our specialists' availability to receive answers to their questions.

In the event that your question is not answered within this document, please submit your question, via email, to our Security Helpdesk at egrants@mt.gov. Our security coordinator will respond to you within 24 hours.

➤ *I need an E-Grants account. What now?*

Please skip ahead to the [New User Set-Up](#) section.

➤ *Where is the E-Grants Security Form?*

All E-Grants security will now be done through the E-Grants system itself. No more paper forms- hooray!

➤ *Why is my password not working?*

All E-Grants passwords expire after 90 days. If you receive an error message stating that your password has expired, please follow the [Forgot Password](#) instructions on page 5.

➤ *I have an E-Grants account but I'm switching districts. How do I change my security access to the new district?*

Please see the section [Modify Existing Users](#).

➤ *I requested a new account for my superintendent three weeks ago. How do I know if their account was created?*

If you have submitted a **New User Request** on behalf of a coworker or supervisor, you will not receive a notification email once that process has been completed. Only the email address listed on the New User account will receive a notification. Please have the requested new user themselves check their email for the E-Grants notification.

➤ *My organization has two Authorized Representatives listed, but one of them isn't with our district anymore. How do we remove them?*

Please have the current Authorized Representative remove any outdated Authorized Representatives using the instructions listed in the section [Modify Existing User Accounts](#).

NEW USER
It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

Search: yellowstone **SEARCH** **LE DETAIL**

Yellowstone Academy Elem
Yellowstone/W Carbon Coop
Yellowstone Academy HS
Yellowstone Boys & Girls Ranch

LE # 9707 Yellowstone/W Carbon Coop **REMOVE SELECTED LE**

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

Karen Underwood - Yellowstone/W Carbon Coop
karen@ywcsc.k12.mt.us
Bridget Gauthier - Yellowstone/W Carbon Coop
ywcsc@yahoo.com-2

ADD NEW LEGAL ENTITY **REQUEST NEW ACCOUNT** **CLOSE**

- *I am trying to create a New User Request and/or add another district to my account, but the contact information for my Authorized Representative doesn't appear when I select my LE. What now?*

In this instance, you will see the **error message** circled below. The AR Contact Information in this section is extracted from the Office of Public Instruction's **Central Directory** (OPI Central Database). If no contact information is listed, this means that the Central Directory must be updated prior to the submission of any E-Grants account requests.

- **For New Superintendents:** This database may be accessed by district clerks using their Common Login. If an Authorized Representative has recently been hired, use this Common Login account to access the **Contacts** application and update the Authorized Representative contact information. (If a district clerk is not available, please contact Leisa Blanton at Lblanton@mt.gov for information on manually update the information.) The Authorized Representative may then request access to the E-Grants system, and once provided with an account, may approve requests for all other staff.
- **No Available Superintendent:** If a district superintendent or other Authorized Representative has recently left the district, please complete an Authorized Representative Exception form and submit to OPI to grant temporary Authorized Representative rights to another person. This person may then request access to E-Grants.
- **For All Other Roles:** Please ensure that there is an Authorized Representative on file prior to attempting a request for E-Grants rights. The system will not allow this request to be submitted.

E-Grants System

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

yellowstone

SEARCH

LE DETAIL

Yellowstone Academy Elem
Yellowstone/W Carbon Coop
Yellowstone Academy HS
Yellowstone Boys & Girls Ranch

LE # 9855 Yellowstone Academy HS

REMOVE SELECTED LE

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

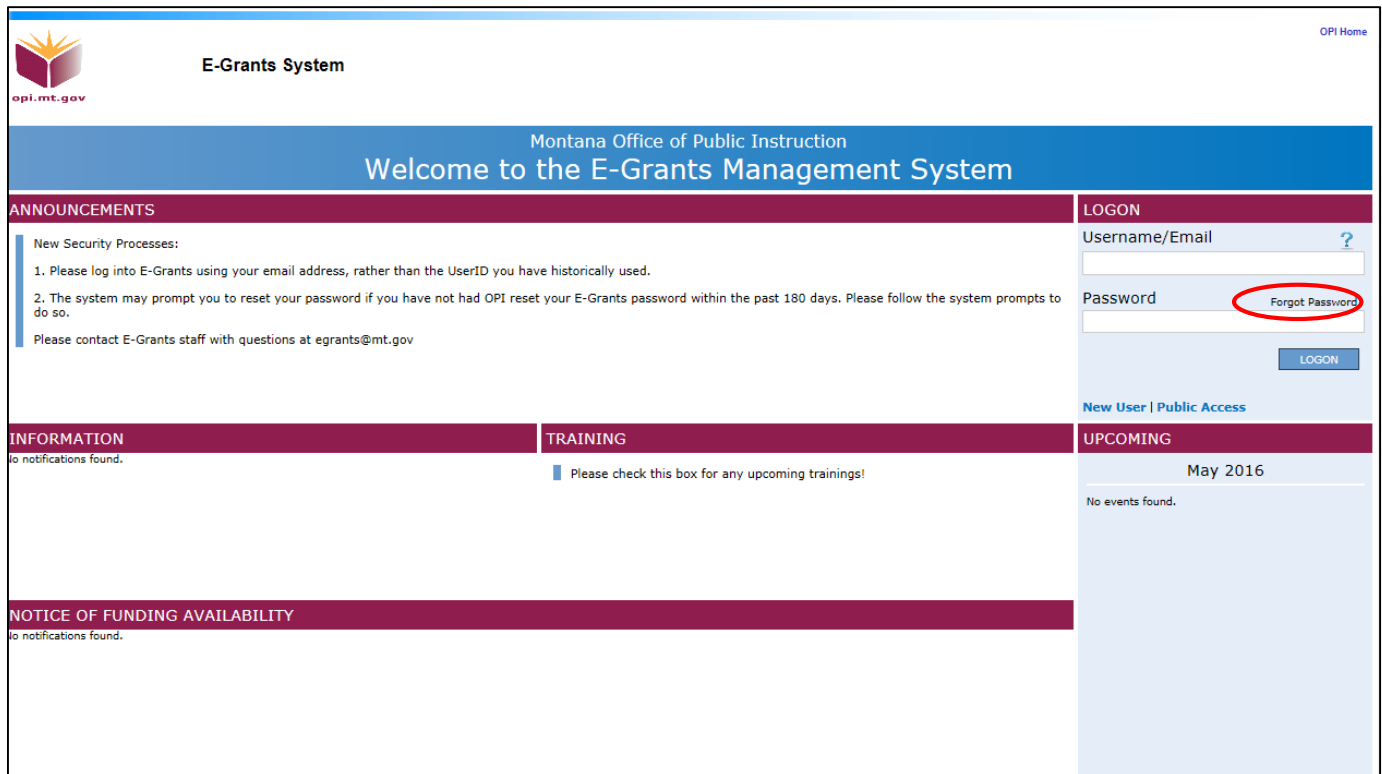
Unable to find any local security admins with the provided search criteria. If you would like to request a login to E-Grants, click the request new account button.

ADD NEW LEGAL ENTITY REQUEST NEW ACCOUNT CLOSE

Powered by **MTV Solutions** Management System

Forgot Password

Step 1. If a user has either forgotten their password – OR – has an expired password, the user simply enters their email address and selects the **Forgot Password** link.

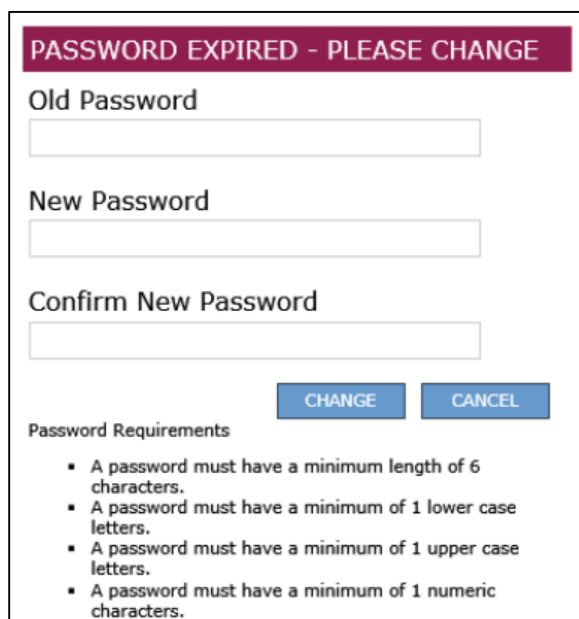


Step 2.

The system will then display a message informing the user that an email has been sent with a **one-time temporary password**.

When the user enters this password, he or she will be prompted to change the password.

Note the password requirements when setting a new password:



Helpful Hint!

Once the user has entered their email address and temporary password, this box (at left) will appear.

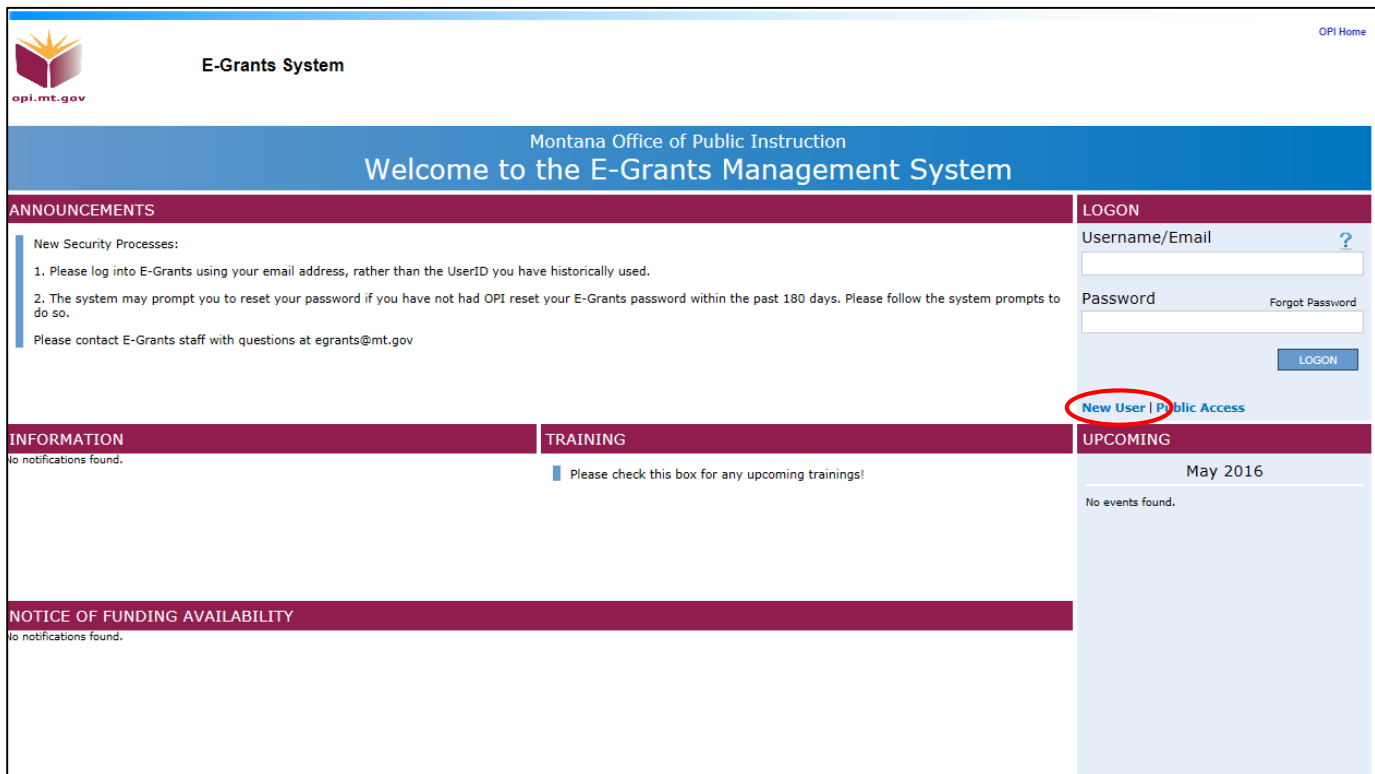
The user must re-enter the temporary password in order to create a new password. Do not attempt to input a previous password once the **Forgot Password** process has been initiated.

Do not click Forgot Password multiple times.

New Legal Entity (LE) Set-Up

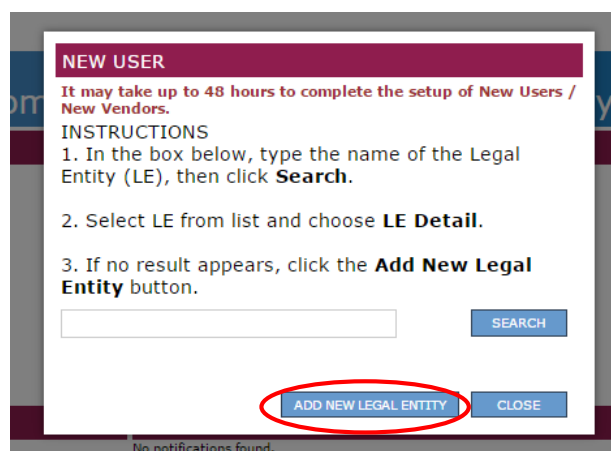
To create a new Legal Entity with the Montana Office of Public Instruction, please follow these instructions.

Step 1. Select the **New User** link from the **Logon Page**.



The screenshot shows the E-Grants System login page. At the top left is the OPI logo and the text "E-Grants System". At the top right is a link for "OPI Home". Below this is a blue banner with the text "Montana Office of Public Instruction" and "Welcome to the E-Grants Management System". The page is divided into three main sections: ANNOUNCEMENTS, INFORMATION, and NOTICE OF FUNDING AVAILABILITY on the left; TRAINING in the center; and LOGON and UPCOMING on the right. The LOGON section contains fields for "Username/Email" and "Password", a "Forgot Password" link, and a "LOGON" button. Below the password field, the links "New User" and "Public Access" are visible, with "New User" circled in red. The UPCOMING section shows the month "May 2016" and states "No events found."

Step 2. Select the **Add New Legal Entity** button.



The screenshot shows a modal window titled "NEW USER". It contains the following text: "It may take up to 48 hours to complete the setup of New Users / New Vendors." followed by "INSTRUCTIONS". The instructions are: "1. In the box below, type the name of the Legal Entity (LE), then click **Search**." "2. Select LE from list and choose **LE Detail**." "3. If no result appears, click the **Add New Legal Entity** button." Below the instructions is a text input field and a "SEARCH" button. At the bottom of the modal, there is a button labeled "ADD NEW LEGAL ENTITY" which is circled in red, and a "CLOSE" button. At the very bottom of the modal, it says "No notifications found."

Step 3. The **New Vendor Request Form** will display.

- The fields on the left should be completed for the **new vendor** (organization name, address, street address, city, state, zip code, phone number and website).
- The fields on the right should be completed for the **Authorized Representative** of the district (first name, last name, email and role) along with designating the authorized representative role.
- A completed IRS W-9 form must be uploaded using the **Attach W-9** button. In addition, a link to the OPI new Vendor Form is provided by selecting the highlighted 'New Vendor Form'.
- A completed new vendor form is uploaded by selecting the **Attach Vendor Form** button. If an incorrect form is uploaded, simply browse and select the correct form and it will replace the form previously uploaded. When the new vendor request is correctly completed select the **Submit** button.

NEW LEGAL ENTITY REQUEST

An IRS W-9 form and OPI New Vendor Form must be completed prior to submitting this New Legal Entity Request. Please contact (406) 444-3095 with any questions.

ATTACH W-9
ATTACH VENDOR FORM

Legal Entity (LE) Name

Address
 Street
 City
 State Zip
 County No.

Phone

Website

First Name

Last Name

Email

Role

SUBMIT TO OPI **CANCEL**

Once the user has clicked **Submit**, a verification pop-up will appear informing the user that their request has been submitted. **The OPI Security Officer must approve the request.**

If approved, the new organization will be added to E-Grants and the Authorized Representative named in the request will be sent an email informing him/her that her request has been approved and providing them with their password.

At that time other user requests for access to that LE in E-Grants may be submitted.

New User Set-Up



NOTE: The New User Set-Up function only applies to users who have never been assigned an E-Grants account. For existing users, please see [Modify Existing Accounts](#).

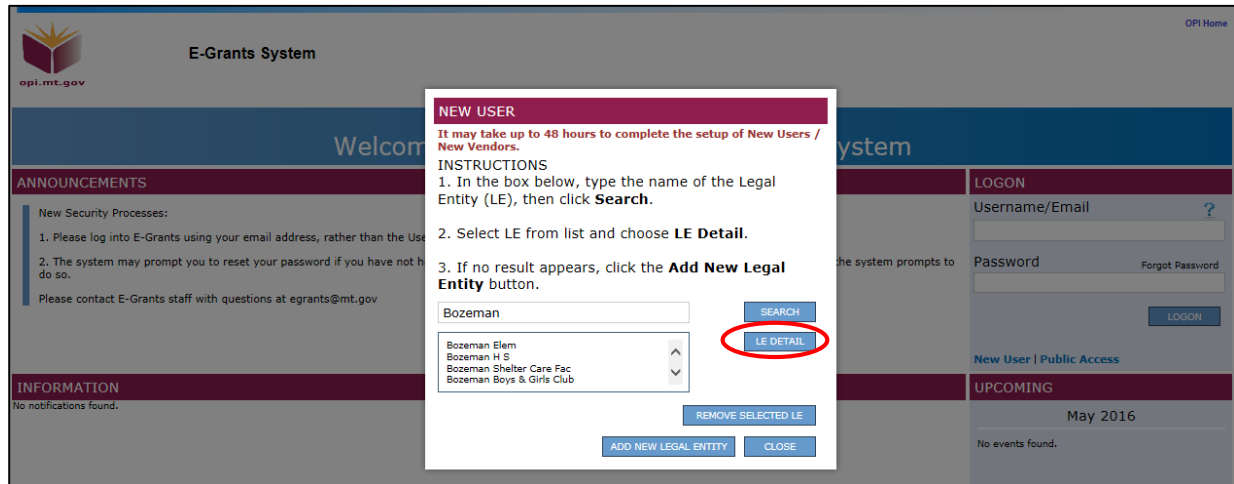
Step 1. Select the **New User** link from the E-Grants Logon Page.

Step 2. Enter the name of the **Legal Entity (LE)**.

The Legal Entity may consist of a Local Education Agency (LEA), a not-for-profit organization, an institution of higher education, or other vendor receiving grant funding from the Montana Office of Public Instruction. Click **Search**.



Step 3. Select the Legal Entity (LE) from the list, and click **LE Detail**.



E-Grants System
opi.mt.gov

NEW USER
It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS
1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

Bozeman

Bozeman Elem
Bozeman H S
Bozeman Shelter Care Fac
Bozeman Boys & Girls Club

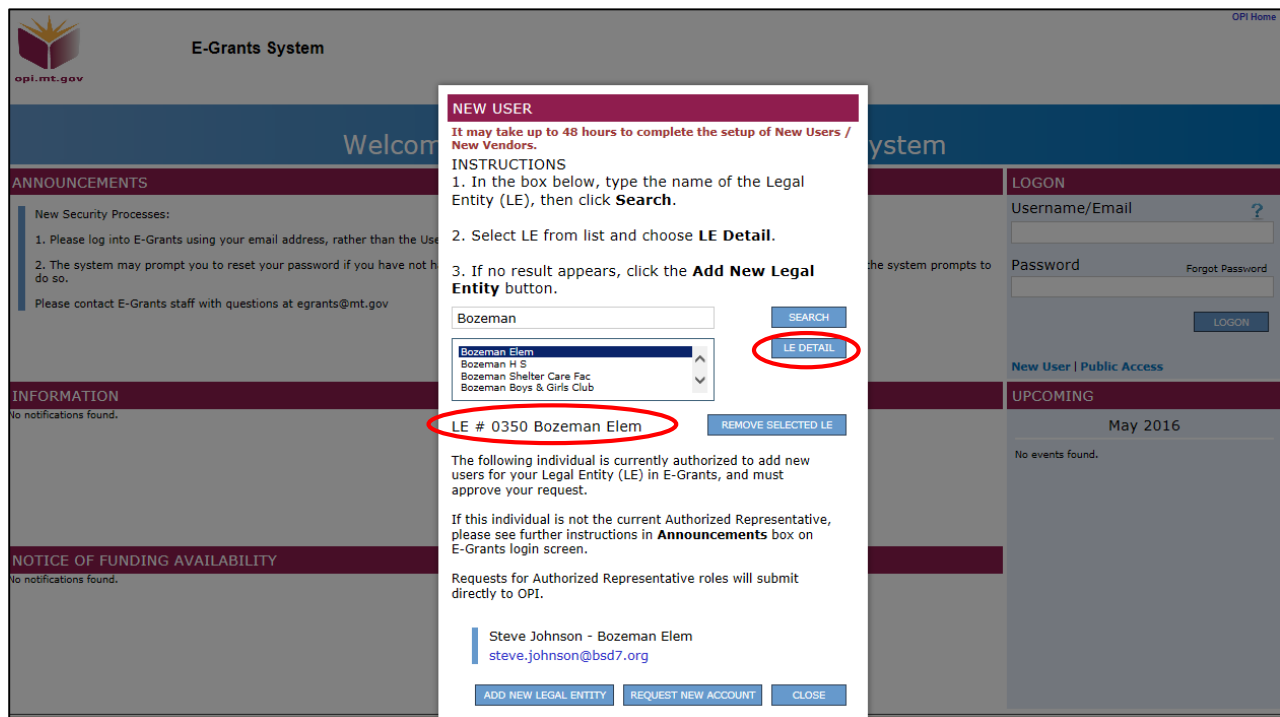
LE DETAIL

REMOVE SELECTED LE

ADD NEW LEGAL ENTITY **CLOSE**



This will add the Legal Entity to your account request. The LE name and number will appear in the lower half of the pop-up window.



E-Grants System
opi.mt.gov

NEW USER
It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS
1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

Bozeman

Bozeman Elem
Bozeman H S
Bozeman Shelter Care Fac
Bozeman Boys & Girls Club

LE DETAIL

LE # 0350 Bozeman Elem

REMOVE SELECTED LE

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org

ADD NEW LEGAL ENTITY **REQUEST NEW ACCOUNT** **CLOSE**

Step 4. To add additional LE(s), select another LE from the list and click **LE Detail**.

NEW USER
It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS
1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

Bozeman

SEARCH

Bozeman Elem
Bozeman H S
Bozeman Shelter Care Fac
Bozeman Boys & Girls Club

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S

REMOVE SELECTED LE

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org

Steve Johnson - Bozeman H S
steve.johnson@bsd7.org

ADD NEW LEGAL ENTITY REQUEST NEW ACCOUNT CLOSE

NEW USER
It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS
1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

cottonwood

SEARCH

Cottonwood Elem
Cottonwood Elem
Cottonwood Elem

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S, LE # 0182 Cottonwood Elem

REMOVE SELECTED LE

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on

Help! I accidentally selected the wrong LE! What do I do now?

Not a problem- simply click the **Remove Selected LE** button to clear your settings.

Step 5. To add an additional LE that requires a new search, type the new LE name. Any previously added Legal Entities will remain in your list. The Authorized Representative listed for each LE added will appear in the bottom of the screen.

Step 6. Once all LEs have been selected, click **Request New Account**.

E-Grants System

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

INSTRUCTIONS

1. In the box below, type the name of the Legal Entity (LE), then click **Search**.
2. Select LE from list and choose **LE Detail**.
3. If no result appears, click the **Add New Legal Entity** button.

Search: cottonwood

Results:

- Cottonwood Elem
- Cottonwood Elem
- Cottonwood Elem

Buttons: SEARCH, LE DETAIL, REMOVE SELECTED LE

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S, LE # 0182 Cottonwood Elem

The following individual is currently authorized to add new users for your Legal Entity (LE) in E-Grants, and must approve your request.

If this individual is not the current Authorized Representative, please see further instructions in **Announcements** box on E-Grants login screen.

Requests for Authorized Representative roles will submit directly to OPI.

Authorized Representatives:

- Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org
- Steve Johnson - Bozeman H S
steve.johnson@bsd7.org
- Doug Ellingson - Cottonwood Elem
D.Ellingson@co.custer.mt.us

Buttons: ADD NEW LEGAL ENTITY, REQUEST NEW ACCOUNT, CLOSE

Step 7. The **New User Request** form appears.

NEW USER REQUEST

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S

Authorized Rep requests are submitted directly to OPI. All other account requests are submitted to the contact listed below.

First Name:

Last Name:

Email:

Role:

Comment:

Authorized Representative:

- Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org
- Steve Johnson - Bozeman H S
steve.johnson@bsd7.org

Buttons: SUBMIT, CANCEL

Step 7. Enter the appropriate **contact information** into the form and click **Submit**.



You may only select one **Role** type on single New User Request. If you required different roles (for example, Business Manager at one district but Authorized Representative at another district), please submit two requests.

NEW USER REQUEST

LE # 0350 Bozeman Elem, LE # 0351 Bozeman H S, LE # 0182 Cottonwood Elem

Authorized Rep requests are submitted directly to OPI. All other account requests are submitted to the contact listed below.

First Name
Johnny

Last Name
Appleseed

Email
johnappleseed@mt.gov

Role
Financial Data Entry

Comment
TEST

Authorized Representative

- Steve Johnson - Bozeman Elem
steve.johnson@bsd7.org
- Steve Johnson - Bozeman H S
steve.johnson@bsd7.org
- Doug Ellingson - Cottonwood Elem
D.Ellingson@co.custer.mt.us

SUBMIT **CANCEL**

Each request will be delivered to the Authorized Representative listed for each LE selected. For users requesting access to both Elementary and High School districts, the Authorized Representative will receive two requests.

Step 8. Your request has been **submitted**!

If you have requested the **Authorized Representative** role, your request will submit directly to OPI security staff.

If you have requested **any other role**, the Authorized Representative for that Legal Entity must approve your request and submit it to OPI. Please contact your Authorized Representative and have them approve the request, as per the instructions on page.




Modify an Existing Account



If the user has an existing E-Grants account, please use this process to add or change access to an additional Legal Entity, or add additional roles or rights within a given Legal Entity.

Step 1. Select **Manage User Accounts**. This is a new tab that will allow users to request additional LEs or roles, as well as allow Authorized Representatives to view, reassign or remove all users within their LE.

**E-Grants System**OPI Home
Sign Out

Menu List

[Click for Instructions](#)

You have been granted access to the forms below by your Security Administrator

Administrative

[OPI Reports](#)

[E-Grants User Administration](#)

[Manage User Accounts](#)

[Security Request To Do List](#)

EGrants User Guides

[Comprehensive User Guide](#)

[Creating Amendments User Guide](#)

[Payment System User Guide](#)

Planning

[Planning Tool](#)


[eGrants Access / Select](#)

[Funded Applications](#)

[Other Data Collections](#)

Step 2. On the **Manage User Accounts** page, the user will see a link with their name.

If the user has the Authorized Representative role, the user will see a list of all users within their Legal Entity.

**E-Grants System**OPI Home
Click to Return to Menu List / Sign Out

Manage E-Grants User Accounts

LE: Browning Elem

LE USERS

Name	Email Address	User Role
Jason Andreas	jasona@bps.k12.mt.us	User Guides - LEA
Stacy Edwards	stacye@bps.k12.mt.us	LEA Business Mgr , User Guides - LEA
Jeri Matt	jerim@bps.k12.mt.us	
John Rouse	johnr@bps.k12.mt.us	LEA Auth Rep , User Guides - LEA , leaSecurityAdmin

Step 3. To add an additional business role to an existing assigned LE, follow the instructions on the screen to **Amend Current Access**.

To request access to a different LE, follow the instructions on the screen to **Add Additional LE**.

Once all new requested access has been added to your screen, select **Request**. This will submit your request to the Authorized Representative for the requested LE.

NOTE: Only the Authorized Representative may remove a user's access from an LE.
Non-AR users may not remove themselves.



Conversely, only a user may request new access for his or her account. The Authorized Representative may not request access for their staff.

NEW USER REQUEST

Browning Elem

Helpful Hints & Frequently Asked Questions

John Rouse Email: johnr@bps.k12.mt.us

Current Access: LEA Auth Rep, User Guides - LEA, leaSecurityAdmin

To Amend Current Access:
Use **ASSIGN** to request role(s).
Use **UNASSIGN** to remove role(s) as needed.
Select **REQUEST** to complete transaction.
To remove a user from the LE completely, click **REMOVE USER** button.

To Add Additional LE:
To establish an account with a different LE, enter LE Name, then click **SEARCH**.
Select LE from list and choose **LE DETAIL**.
Current Assigned business roles will be **automatically** requested. Use unassign/assign to remove or request role(s) with the different LE.
Select **REQUEST** to complete transaction.
Use the **CLOSE** button to erase selections and start over.

Comment:

Enter LE Name:

AVAILABLE BUSINESS ROLES

ASSIGNED BUSINESS ROLES

LEA Business Mgr
LEA Business Manager

LEA Data Entry
LEA Data Entry

LEA Financial Data Entry
LEA Financial Data Entry

LEA Authorized Rep

LEA Level Security Administrator

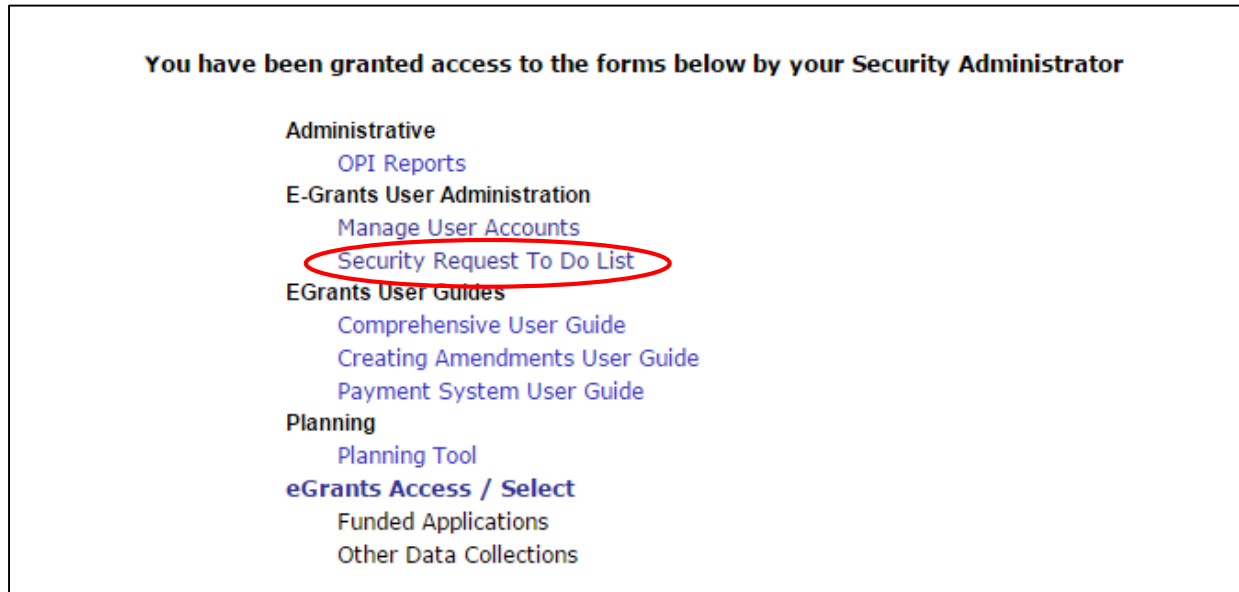
Assigns Access to User's Guides on the
Menu List

Authorized Representative Review of User Requests

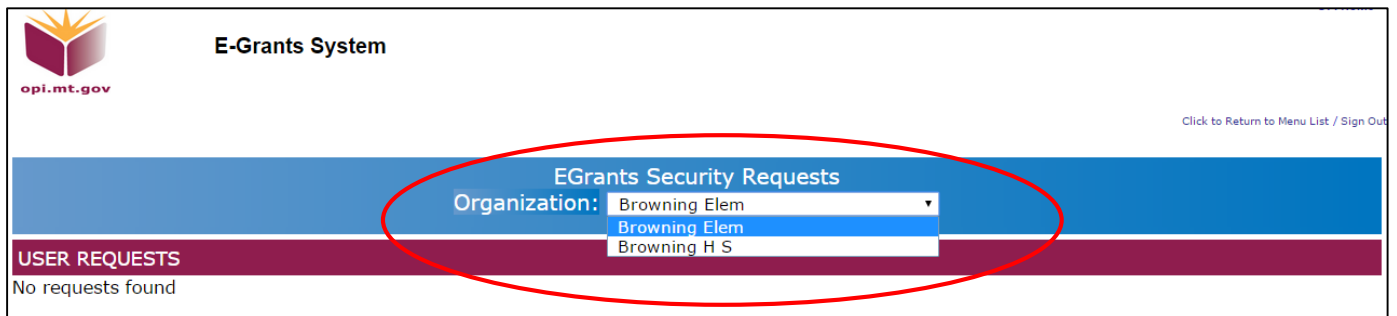
When a user successfully submits a request for access to E-Grants, the Authorized Representative for the district/Legal Entity will receive an email informing them of the request. To review user requests, the Authorized Representative will do the following:

Step 1. Log into E-Grants.

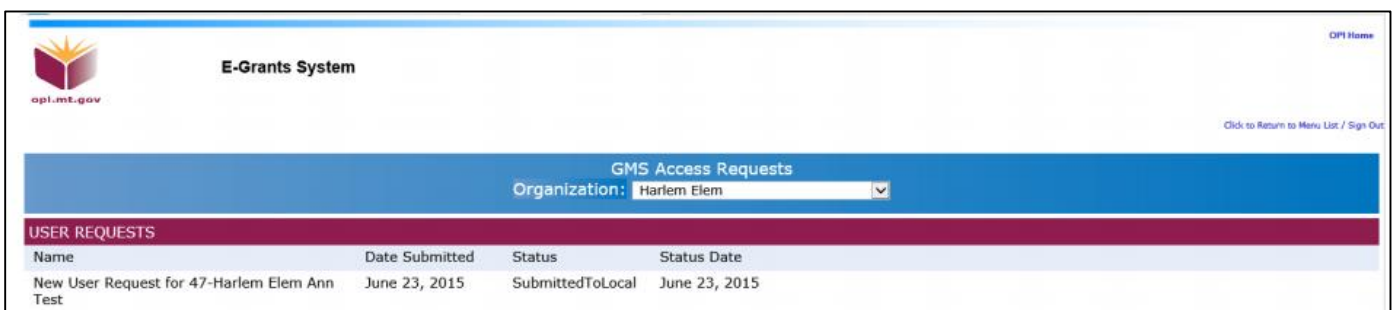
Step 2. Select **Security Request To Do List** from the Main Menu, under the **E-Grants User Administration** category.



Step 3. If the Authorized Representative is associated with multiple organizations, they will need to select the correct organization (LE) from the dropdown list to display the appropriate user request.



Step 4. Once the user request is displayed in the table, double-click on the request to select.



Step 5. The selected **User Request** will be displayed. Under the **New User Request** heading, the role requested by the New User is displayed (see text highlighted).

Business roles available to local-level staff are displayed on the left-hand side.

By clicking **Assign** next to one (or more) of these roles, that user is now associated with that Legal Entity and that Business Role. These changes are applied when the reviewer clicks **Accept**.



An **Accept** action triggers a notification to the OPI Security Administrator that a user request is ready to be reviewed. **Final acceptance by the OPI Security Administrator is needed before a new user is established in the system.**

The **Reject** action triggers a notification to the requester's email that their request has been reviewed and denied.

NEW USER REQUEST

Harlem Elem - Harlem Elem
Ann Test
testa@harlem-k12.mt.us
Data Entry role requested
LSA Email

AVAILABLE BUSINESS ROLES

LEA Auth Rep
LEA Authorized Rep
assign

LEA Business Mgr
LEA Business Manager
assign

LEA Data Entry
LEA Data Entry
assign

BUSINESS ROLES TO ASSIGN

ACCEPT REJECT CLOSE